



Using the Trust Registration Service (TRS): How to obtain Proof of Registration

When a trustee enters a business relationship, for example: a trustee opens a bank account or places money into an insurance policy, the Trustee needs to provide Proof of Registration to the bank or financial institute to confirm that the trust is registered, and that the details that have been registered are correct.

If details of the trust are changed, for example: change to trustee or if there is a withdrawal request, a new Proof of Registration document needs to be sent to the bank or building society.

Creating the Proof of Registration document

1. Open a search engine, for example Google or similar.
2. Type in 'gov.uk maintain a trust'.
3. Click the search result, 'Manage your trust's details – GOV.UK'.
4. Please read the information on the page.
5. Towards the end of the page, click on the green box that says, 'start now'.
6. Enter the Government Gateway user ID and password used to set up the trust.
7. You will be asked whether an agent is managing the trust online. Select 'no' if you are managing the trust yourself or 'yes' if you have an agent managing it on your behalf.
8. You will be asked security questions about the details you provided on the Trust registration.
9. Click 'continue' and answer the three questions. You will be presented with a summary of your answers to check. Click 'submit' to confirm.



Using the Trust Registration Service (TRS): How to obtain Proof of Registration

10. If security is passed, you will be told you have successfully answered the Trust security questions – click ‘continue’.

- If you have any issues with the above, please request ‘claim a trust’ instructions, also available from HMRC.
- Call our helpline on 0300 123 1072 or email trustenquiries@hmrc.gov.uk

11. You will receive a prompt screen about maintaining a trust – click ‘start maintaining this trust’.

12. You will be asked ‘Do you want to view this trust’s last declaration’?

- If yes – you will be presented with last declared copy which you can save/print or you can continue to maintain a trust.
- If no – continue as per the help sheet.

13. You will be asked what you want to do next?

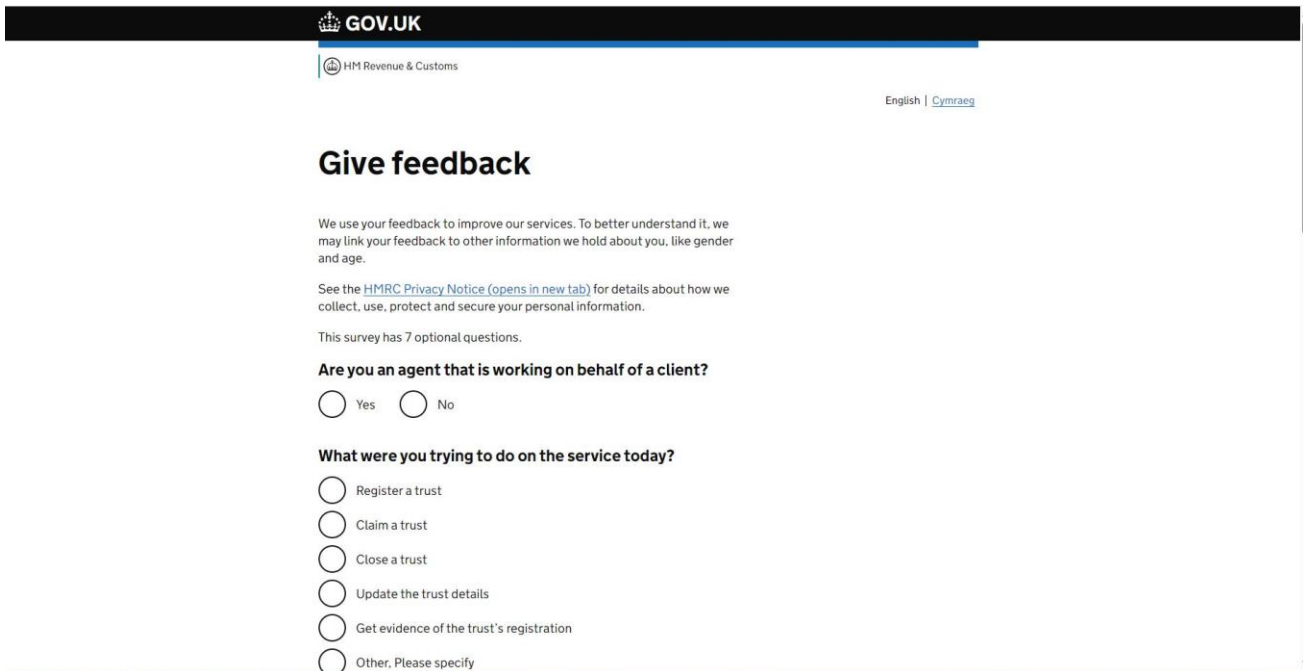
The screenshot shows the top navigation bar of the GOV.UK website with the text 'GOV.UK', 'Register and Maintain a Trust', and 'Sign out'. Below the navigation bar, there is a language selector for 'English | Cymraeg'. A '< Back' link is visible on the left. The main heading is 'What do you want to do next?'. There are four radio button options:

- Make changes to the trust and declare
Add or remove beneficiaries, protectors, settlors, trustees and any other individuals, and make changes to their details and declare the changes to HMRC.
- Close the trust and declare
Tell us the end date for the trust, and make any changes to the trust details before declaring the changes to HMRC.
- Tell HMRC if the trust needs to pay tax
Tell HMRC if the trust needs to pay tax or submit tax returns.
- Get evidence of the trust’s registration
Create a digitally signed PDF, which shows the people and

Select ‘Get evidence of the trust’s registration’, select ‘yes’ and click ‘continue’.

Using the Trust Registration Service (TRS): How to obtain Proof of Registration

14. You will be taken to a screen with the title 'Give feedback'.



The screenshot shows the 'Give feedback' page on the GOV.UK website. The page header includes the GOV.UK logo and 'HM Revenue & Customs' on the left, and 'English | Cymraeg' on the right. The main heading is 'Give feedback'. Below this, there is a paragraph explaining that feedback is used to improve services and that it may be linked to other information held about the user. A link to the 'HMRC Privacy Notice' is provided. It states that the survey has 7 optional questions. The first question is 'Are you an agent that is working on behalf of a client?' with radio buttons for 'Yes' and 'No'. The second question is 'What were you trying to do on the service today?' with radio buttons for 'Register a trust', 'Claim a trust', 'Close a trust', 'Update the trust details', 'Get evidence of the trust's registration', and 'Other, Please specify'.

15. You might think you've gone too far, you haven't. In the top right corner of this screen your document will appear to download – click on the download to obtain a PDF copy of your Proof of Registration.